

## Organization Administrator: Maintain Document Library

### This Job Aid shows how to:

- Create and Maintain a Document Library in COMMBUYS

### Of Special Note:

The Document Library, which in COMMBUYS is referred to as the Attachment Repository, is used to create a library of frequently used documents or standard department forms. These forms will reside in a central repository available to all department users. You will be able to organize a folder structure to support the library and devise a naming convention and description for the documents which will aid in retrieval. Buyers will be able to search, download and attach these documents to bids, requisitions or contracts (Master Blanket Purchase Orders). Documents and forms can also be designated to auto-attach based on the transaction type and designate which auto-attached forms are required (bid, requisition, purchase order). There is no document editing within COMMBUYS therefore the use of auto-attach should be reserved for all files/document that do not require the end user to update for each purchase or bid.

### Screenshot



Welcome To **COMMBUYS**

**COMMBUYS**  
OPERATIONAL SERVICES DIVISION

COMMBUYS is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers.

**COMMBUYS INFORMATION:**  
For more information on COMMBUYS please visit the [COMMBUYS](#) support pages.  
[Training and Registration for Purchasers](#)  
[Training and Registration for Sellers](#)  
[Job Aids for Purchasers](#)  
[Job Aids for Sellers](#)

If you have any questions or concerns contact the COMMBUYS Help Desk at [COMMBUYS@state.ma.us](mailto:COMMBUYS@state.ma.us) or ring us during normal business hours (8AM – 5PM Monday – Friday) at 1-888-627-8283 or 617-720-3197.

- [Register](#)  
Register here to begin using COMMBUYS.  
Vendors, please read this [disclaimer](#) prior to registering.
- [Complete Registration](#)  
Complete registration here to begin using COMMBUYS.  
Vendors, please read this [disclaimer](#) prior to completing registration.
- [Open Bids](#)  
Browse open bid opportunities.
- [Active Contracts](#)  
Browse active Contracts/Blankets.
- [Contract & Bid Search](#)  
Search for Bids and active Contracts/Blankets.
- [Registered Vendor Search](#)  
Search for registered vendors.

Login ID:   
 Password:

[Forgot your password?](#)

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### Directions

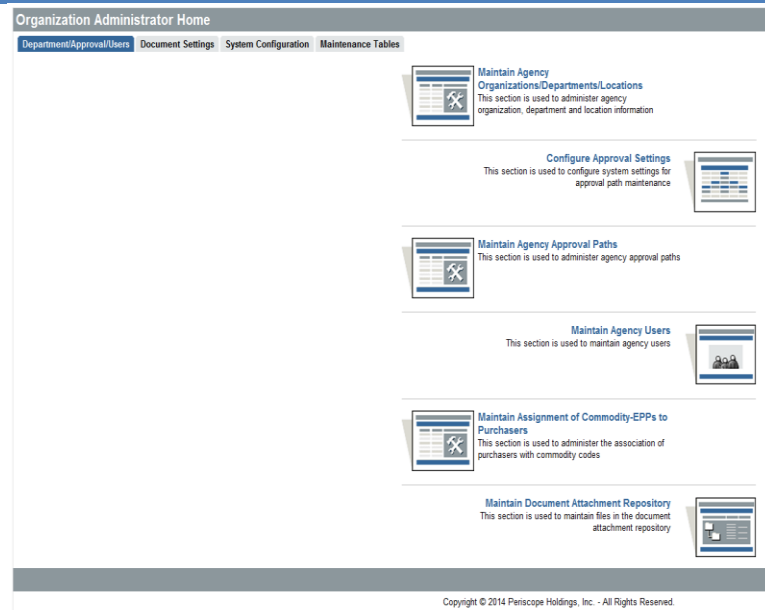
1. Launch the COMMBUYS website by entering the URL [www.commbuys.com](http://www.commbuys.com) into the Browser.

Login using your Login ID and password.



## Organization Administrator: Maintain Document Library

## Screenshot



## Directions

2. This is the Organization Administrator home page which is the **Control Center** for all actions related to organization configuration and maintenance.

The home page opens on the **Department/Approval/Users** tab. This page is the main menu and the starting point for most Organization Administrator actions.

To create folders or add documents, click the **Maintain Document Attachment Repository** icon.

COMMBUYS will open the Maintain Document Attachment Repository view for the User's Current Organization.

3. From this page, you have the option to create folders and add documents.

The Repository Location dropdown menu gives two options:

Non Searchable: option to select for adding forms to your library.

Repository: option to view all documents in the library and any documents previously attached in a CB transaction.

We will keep NonSearchable as the default and begin creating our document library.

Click on the **Create Folder** link.

## Maintain Attachment Repository

Repository Location: DataMigration ▼

**2100** Add File | Create Folder  
(empty)

4. After clicking the **Create Folder** link, enter a name for the folder. Folders will help you organize your library.

Naming conventions are strongly encouraged. Consistent naming conventions will make it easier for your department users to search for and locate documents.

Once a Folder is created, it cannot be removed.

Once complete, click **Save**.



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## Organization Administrator: Maintain Document Library

### Screenshot

#### Maintain Attachment Repository

Repository Location: DataMigration ▾

2100 Add File | Create Folder  
Bid Attachments Add File | Create Folder

### Directions

5. Now that a folder is created, documents (files) can now be added. Documents can consist of standard documents such as terms and conditions, supplier diversity, or standard forms.

When adding a document, a name and description will be entered.

Once a document is uploaded, it cannot be edited within the Library or Repository. An uploaded document cannot be replaced or overwritten. This makes the description and naming all the more critical. Not only do you want to ensure your users are able to facilitate an accurate search for the document, but you want to make sure users will always select the most up to date document.

Click on the **Add File** link next to the folder you want to add a file to.

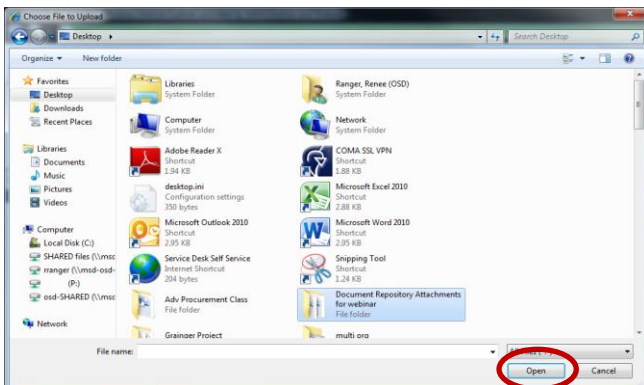
6. The Add File page displays. Items marked with an asterisk (\*) are required fields.

Here you can browse your computers folders for any documents/files you want to add.

We will first find the file we want to attach by clicking on the **Browse** button.

7. The Browse button opens the Upload File window on your computer.

Select the file you want to add to the folder by clicking on it to highlight it and then click the **Open** button.





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## Screenshot

**Add File**

Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name of the file on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 255.

Name\* Commonwealth Terms and Conditions 3/32/15.doc

Description: Terms and Conditions 3/3/15

File\* C:\Users\mrogers\Desktop\Document Repository Attachments for on [Browse...]

Location: 210094 attachments

**Attachment Rules**

Requisition	Bid	Purchase Order
<input type="checkbox"/> Autoattach to new document	<input checked="" type="checkbox"/> Autoattach to new document	<input type="checkbox"/> Autoattach to new document
<input type="checkbox"/> Required	<input type="checkbox"/> Required	<input type="checkbox"/> Required

Save & Exit Save & Continue Reset Cancel & Exit

## Directions

8. If needed, rename the file, and then add a description that will make it easier for users to search for this particular file and it is suggested to put some type of version or date to ensure users are using the most up to date document/file.

This file will now be in your Document Library and can be used by any user and searched for.

**Attachment Rules:** These allow us to set up documents to auto-attach to a bid, requisition or purchase order.

You can also choose to have the document Required.

- A required document cannot be deleted from a transaction.
- A non-required document may be set up to auto-attach, but it may be deleted from the COMMBUYS transaction.

No edits can be made to the files/documents within COMMBUYS, therefore we recommend that any file you wish to auto-attach should not require any updates or edits.

- In order to make edits to the file, it would need to be downloaded from COMMBUYS, updated, and then uploaded.

**Note:** By uploaded files/documents to your Organizations library, users will be able to search for those documents and download them for editing to use when purchasing or procuring.

Let's auto attach the Terms & Conditions document to Bids.

Click **Save & Exit**.



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## Organization Administrator: Maintain Document Library

### Screenshot

#### Maintain Attachment Repository

Repository Location: Data Migration

2100 Add File | Create Folder

Add Attachments

[Commonwealth Terms and Conditions 3/3/2015.doc](#) Terms and Conditions 3/3/15

Exit

### Directions

9. Our document now displays in the folder.

Repeat as necessary.

From looking at the document(s) in the Document Library (Attachment Repository), you cannot tell if rules have been set up. You have to click on the blue link to open up the file and check for attachment rules. From there you could add or remove attachment rules if necessary.

Click on the blue file link to open up the file.

10. Once in the file, we can add additional attachment rules or remove previously set rules.

It is here that we could also download the file and modify it if necessary and then attach new version with a new This would be

accomplished by clicking on the icon.

Repository File: Commonwealth Terms and Conditions 3/3/2015.doc

Name: Commonwealth Terms and Conditions 3/3/2015.doc

Description: Commonwealth Terms and Conditions 3/3/15

File: Commonwealth Terms and Conditions for Human and Social Services.doc

Location: 210000 Terms

Size: 200000 bytes

Uploaded: 03/03/2015 09:01:33 AM

Last Modified On Date: 03/03/2015 09:01:33 AM

Uploaded By: Renee O'Rourke

Attachment Rules

Request: ☐ Autolink to new document ☐ Required

Bid: ☒ Autolink to new document ☐ Required

Purchase Order: ☐ Autolink to new document ☐ Required

Save & Exit Save & Continue Reset Cancel & Exit